

# 2004 Strategic Plan



# California Board of Occupational Therapy

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# CALIFORNIA BOARD OF OCCUPATIONAL THERAPY

## STRATEGIC PLAN 2004

### INTRODUCTION

The California Board of Occupational Therapy (Board), established on January 1, 2001 (Senate Bill 1046, Chapter 697, Statutes of 2000), protects the health, safety, and welfare of California consumers by regulating the practice of occupational therapists and occupational therapy assistants. Seven board members (five appointed by the Governor, one by the Senate Rules Committee and one by the Speaker of the Assembly) meet four times annually to set policy, develop legislation and regulations that identify education, experience and examination requirements for licensure or certification, and establish and enforce professional standards of practice.

As of June 2004, 7,675 occupational therapists and 1,380 occupational therapy assistants had been licensed or certified in California. In addition, 1,138 occupational therapists had been issued advanced practice certificates allowing them to offer services in hand therapy, the use of physical agent modalities, and/or swallowing assessment, evaluation or intervention.

Significant accomplishments include:

- Passage of legislation identifying requirements for advanced practices;
- Passage of legislation authorizing the Board to take disciplinary action against licensees or certificate holders for unprofessional conduct and other violations of law;
- Passage of legislation clarifying requirements for practitioners licensed in other jurisdictions who work in California for short periods of time;
- Establishment of an aggressive enforcement program;
- Adoption of regulations authorizing the Board to issue citations and administrative fines for violations of law;
- Adoption of regulations pertaining to ethical standards of practice and introduction of disciplinary guideline regulations,
- Introduction of regulations setting forth continuing competency, supervision, and limited permit requirements;
- Introduction of regulations to reduce license/certificate renewal fees;
- Creation of a Web site that includes online license/certificate verification; and
- Participation on the Older Californian Traffic Safety Task Force and creation of a directory listing Driver Safety and Rehabilitation programs.

# STRATEGIC PLANNING PROCESS

The Board adopted its first Strategic Plan on June 21, 2002 identifying its mission, vision, key issues, core values, and goals and objectives for the first three years of operation. The Strategic Plan was updated in 2003 and again in 2004 to reflect the Board's accomplishments and set new target dates for completion of the goals developed for 2004 through 2006. Development of a strategic plan is ongoing and the Board's action plan will be continually monitored and revised to meet the challenges of consumer protection.

## MISSION

The mission of California Board of Occupational Therapy is to regulate the practice of occupational therapy in a manner that protects the wellbeing of the public by:

- Ensuring that those entering the profession meet minimum standards of competency through education, fieldwork and examination;
- Defining and upholding professional and ethical standards of practice;
- Informing the public and other entities about the profession and standards of practice;
- Enforcing the laws and regulations governing occupational therapy; and
- Providing effective means for resolving consumer complaints.

## VISION

The California Board of Occupational Therapy is recognized as the model organization for all occupational therapy state regulatory boards, ensuring consumer protection and quality occupational therapy services.

## CORE VALUES

The California Board of Occupational Therapy will strive for the highest possible quality throughout all of its programs making it an outstanding regulatory organization by:

- Upholding ethical standards of practice;
- Providing excellent customer service;
- Recognizing and appreciating diversity;
- Valuing the unique contribution of occupational therapy practitioners;
- Applying the law fairly; and
- Valuing active participation of all stakeholders in decision-making, efficiency, integrity, and competence.

# KEY STRATEGIC ISSUES

A number of key strategic issues require focused attention:

## EDUCATION

- National movement to require a master's degree for occupational therapists.
- Participation in the process of educating students so that they are properly prepared to practice safely upon licensure/certification.

## EXAMINATIONS

- On-demand testing and its impact on recent graduates entering the marketplace.

## PROFESSIONAL QUALIFICATIONS

- Defining continuing competency.
- Defining "advanced practices" and the level of education, training and experience needed for safe practice.

## ENFORCEMENT AND SAFETY

- Enforcing rules and regulations.
- Defining appropriate supervision requirements.
- Establishing a diversion program.
- Conducting consumer complaint analyses.

## PUBLIC AND PROFESSIONAL AWARENESS

- Outreach to consumers and practitioners regarding laws and regulations affecting occupational therapy.
- Enhancing professional relationships with the American Occupational Therapy Association (AOTA), the Occupational Therapy Association of California (OTAC), the National Board for Certification in Occupational Therapy (NBCOT), and the Accreditation Council for Occupational Therapy Education (ACOTE) as they relate to regulatory issues.
- Strengthening relationships with other health care professionals such as physical therapists, speech-language pathologists and audiologists, nurses, physicians, etc., to ensure adequacy of occupational therapy regulations and enforcement procedures.
- Changes in the marketplace and practice settings.
- Cultural diversity/demographics/aging population.
- Prospective payment system (PPS).
- Healthcare financing.

## ORGANIZATIONAL EFFECTIVENESS

- Advanced planning for 2006/07 sunset review.

## GOALS

The Board has established several goals that provide the framework for the results it wants to achieve:

### Professional Qualifications

Ensure the professional qualifications of those practicing occupational therapy by setting requirements for education, experience, and examination.

### Practice Standards

Promote the professional and ethical practice of occupational therapy.

### Enforcement

Protect consumers by effectively enforcing the laws and regulations governing the practice of occupational therapy.

### Public and Professional Awareness

Educate consumers, practitioners, allied health professionals, related professional organizations, and government agencies on the role of the Board in regulating the practice of occupational therapy.

### Organizational Effectiveness

Provide an efficient organizational structure that yields excellent customer service.

# OBJECTIVES

Goal 1: Ensure the professional qualifications of those practicing occupational therapy by setting requirements for education, experience, and examination.

OBJECTIVE	LEAD RESPONSIBILITY	TARGET DATE
1.1 Implement regulations to clarify limited permit requirements.	Staff	Sept. 30, 2004
1.2 Implement on-line initial and renewal licensing forms.	Staff	July 31, 2005
1.3 Ensure that the licensing examination is legally defensible.	Board/Staff	July 31, 2005
1.4 Develop an improved advanced practice application.	Advanced Practice Regulatory Committee/Staff.	Sept. 30, 2004
1.5 Working with ACOTE, modify the accreditation standards to reflect entry level practice.	Board/Staff	July 31, 2007
1.6 Introduce legislation to address entry level Masters degree requirements/program.	Board/Staff	April 30, 2006

Goal 2: Promote the professional and ethical practice of OT.

OBJECTIVE	LEAD RESPONSIBILITY	TARGET DATE
2.1 Adopt regulations on continuing competency requirements.	Regulatory Committee & Board	February 28, 2005
2.2 Adopt regulations on supervision requirements.	Regulatory Committee & Board	February 28, 2005
2.3 Adopt regulations that define the conditions under which a practitioner, licensed in another state, is allowed to work in California.	Regulatory Committee & Board.	February 28, 2005

Goal 3: Protect consumers by effectively enforcing the laws and regulations governing the practice of occupational therapy.

OBJECTIVE	LEAD RESPONSIBILITY	TARGET DATE
3.1 Adopt regulations on disciplinary guidelines.	Regulatory Committee & Board	March 31, 2005
3.2 Establish a complaint disclosure policy.	Regulatory Committee & Board	July 31, 2005
3.3 Establish a Diversion Program.	Board/Staff	December 31, 2004
3.4 Establish funding for the enforcement program that allows the Board to meet its statutory mandates.	Staff	July 1, 2005

Goal 4: Educate consumers, practitioners, allied health professionals, related professional organizations and government agencies on the role of the Board in regulating the practice of occupational therapy.

OBJECTIVE	LEAD RESPONSIBILITY	TARGET DATE
4.1 Increase awareness of OT among government agencies.	Staff	July 31, 2005
4.2 Partner with OTAC to provide consistent information to practitioners.	Staff	Sept. 30, 2004
4.3 Join the Council on Licensing, Enforcement and Regulation (CLEAR).	Staff	July 31, 2005
4.4 Develop consumer brochures.	Staff	Sept. 30, 2004
4.5 Develop media-based outreach program.	Board/Staff	July 31, 2005
4.6 Begin conducting workshops on the advanced practice application process and on continuing competency supervision requirements.	Board/Staff	Sept. 30, 2005



Goal 5: Provide an efficient organizational structure that yields excellent customer service.

OBJECTIVE	LEAD RESPONSIBILITY	TARGET DATE
5.1 Develop an algorithm for use by staff in responding to questions.	Staff	December 31, 2004
5.2 Complete preparations for the board's Sunset Review	Board/Staff	Sept. 30, 2005
5.3 Establish a database of demographics for management decision-making.	Staff	December 31, 2005
5.4 Reduce licensing renewal fees.	Staff	July 1, 2005
5.5 Secure grant funds to support staff development.	Board	December 31, 2005